MARYLAND JUDICIARY

GEARS General Enterprise And Resource Support

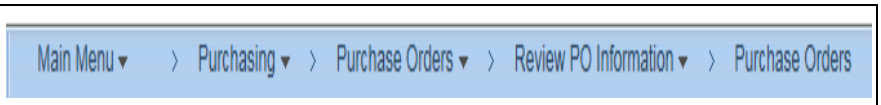
Quick Reference Tip Sheet

NEW: 05/01/2017

General Information

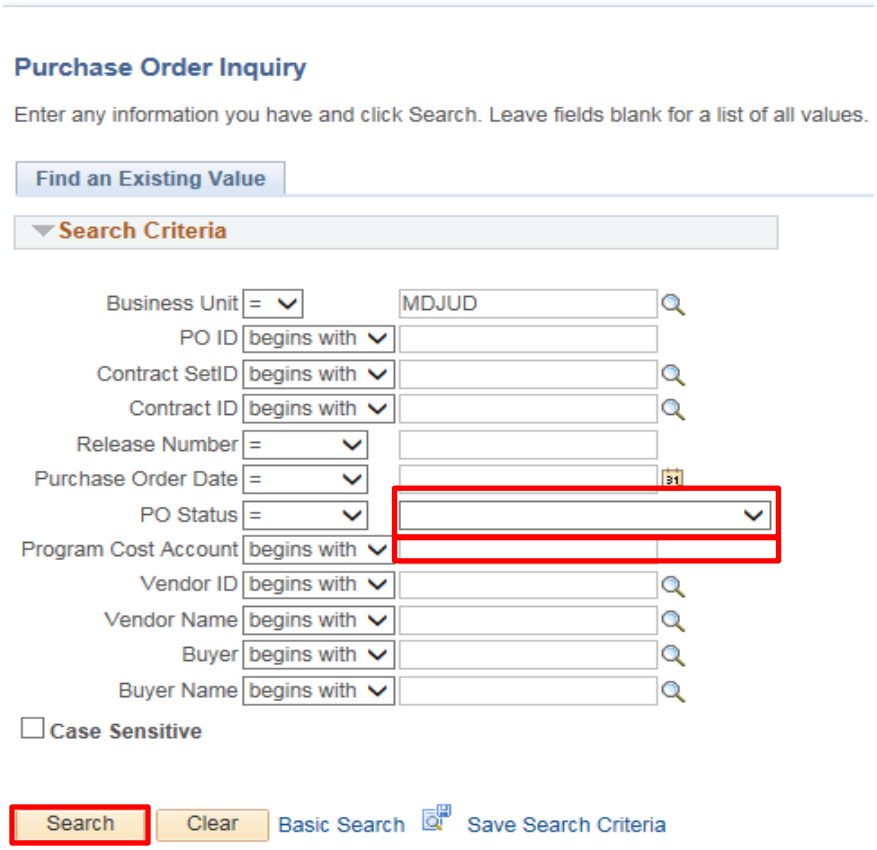
Task	Process Information
Using the Purchase Order Inquiry Page	The **Purchase Order Inquiry** page can be used to assist in the PO Close Request process. Use the **Purchase Order Inquiry** to help identify POs that have NOT been 'Dispatched' which may include the following: 1) POs created in GEARS by mistake or no longer needed 2) POs with PO Status of Approved, Canceled, Denied, Open, Pending Approval, and Pending Cancelation 3) POs with Budget Error(s) After you have identified POs that have NOT been Dispatched that are eligible to be closed, notify DPCGA (Procurement) which POs should be closed (via email to DPCGA). Procurement will then close the requested POs and any associated Requisitions.

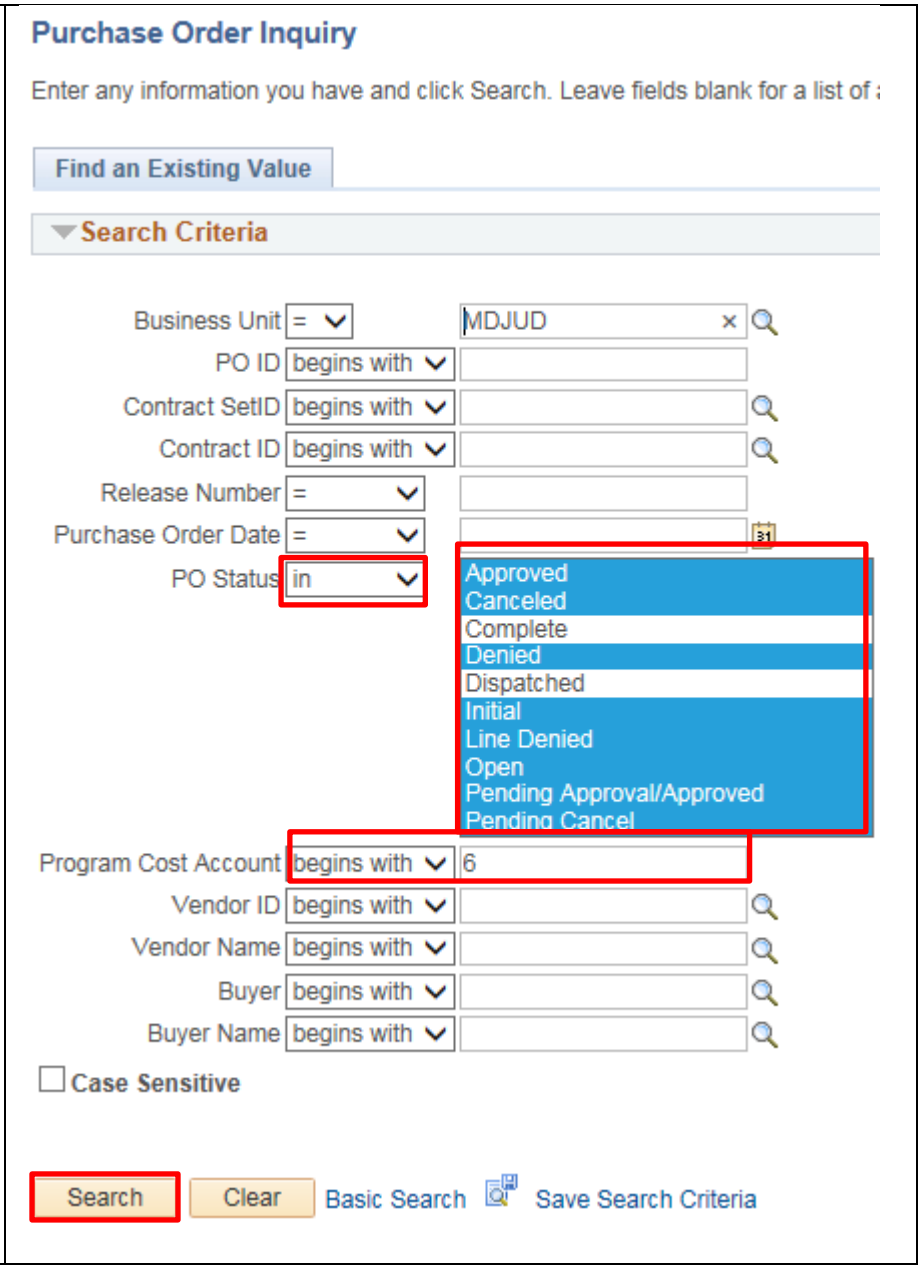
GEARS Navigation

Purchasing > Purchase Orders > Review PO Information > Purchase Orders	

1.0 Process

This document is intended to provide a quick reference to using the Purchase Order Inquiry Page within GEARS.

STEP	ACTION	DETAILS
1.	**<u>Specify the PO Selection Parameters</u>. Enter the criteria for your PO selection, and then click** Search **.** **To select POs that have <u>NOT</u> been 'Dispatched' for your PCA, enter parameters in the Program Cost Account (PCA) and PO Status fields. You should run a search and analyze PO results by the following PO Status:** Approved, Canceled, Denied, Initial, Line Denied, Open, Pending Approval/Approved, and Pending Cancel. **Note: POs with PO Status 'Complete' are already closed in GEARS.**	 **To view POs in your PCA including all PO Statuses, <u>except</u> those POs that have already been closed or dispatched, use the following parameters. Enter your PCA number in the 'Program Cost Account' field. Set the PO Status drop down to 'in', Hold the CTRL key and select Approved, Canceled, Denied, Initial, Line Denied, Open, Pending Approval/Approved, and Pending Cancel.**

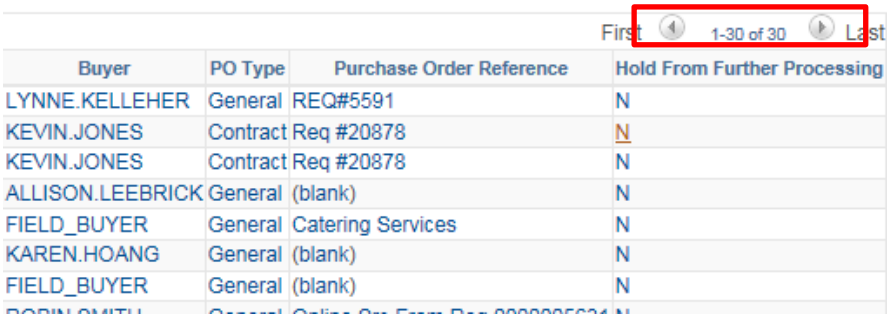

Purchase Order Inquiry
Enter any information you have and click Search. Leave fields blank for a list of
Find an Existing Value
Search Criteria
Business Unit = MDJUD
PO ID begins with
Contract SetID begins with
Contract ID begins with
Release Number =
Purchase Order Date =
PO Status in
Approved
Canceled
Complete
Denied
Dispatched
Initial
Line Denied
Open
Pending Approval/Approved
Pending Cancel
Program Cost Account begins with 6
Vendor ID begins with
Vendor Name begins with
Buyer begins with
Buyer Name begins with
Case Sensitive
Search
Clear
Basic Search
Save Search Criteria

2.

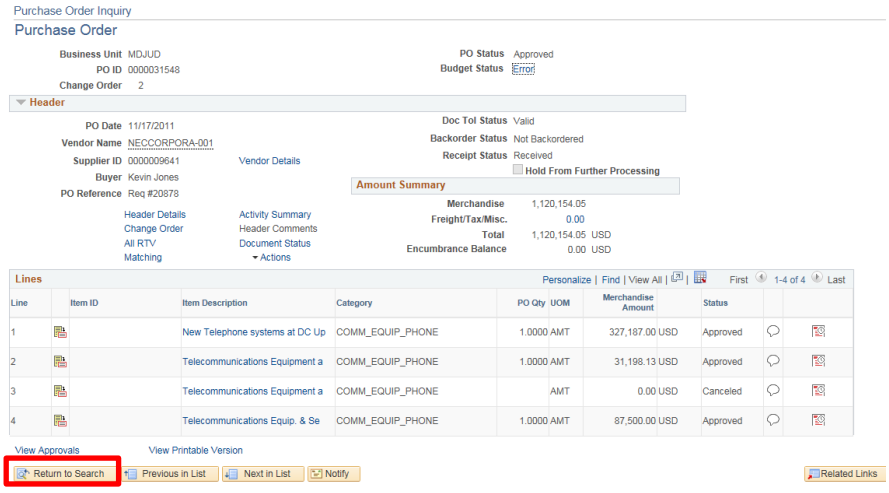
The results from your search criteria display the following fields: PO ID, Contract ID, Release Number, PO Date, PO Status, Program Cost Account (PCA), Vendor ID, Vendor Name, Buyer, PO Type, Purchase Order Reference, Hold From Further Processing.

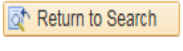
Note: Make note of any POs that are eligible to be closed. Submit an email to DPCGA (Procurement) with a list of POs to be closed.

The page displays a certain number of POs at a time. Depending on the total number of results, there may be more POs as a result of your search. To view additional POs as needed, use the left and right arrow buttons on the top right of the grid. In this example, there were 30 POs based on the search criteria used.

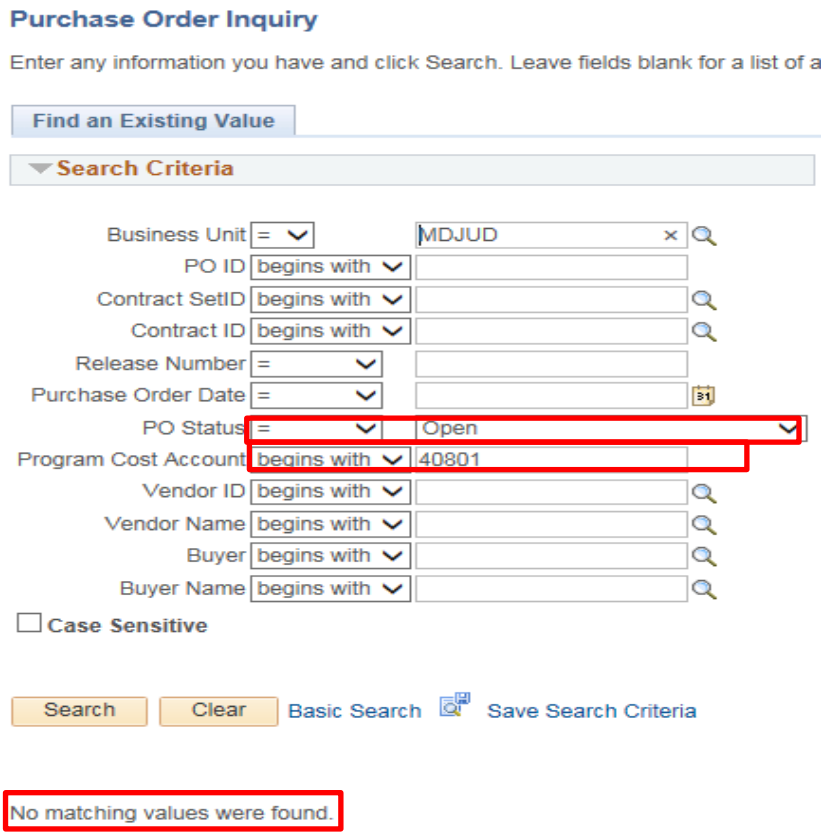


You can click on a PO ID link to access the PO Header/Inquiry Page to look at a more detailed view of the PO.



After you have reviewed details of the PO. Click the 

button to return to PO Selection results.

3.	**If there were no results from the PO selection criteria, the system will return the message,** **“** No matching values were found. **”.** **In this example, the search parameters included, PO Status ‘Open’ and PCA ‘40801’.**	

End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.